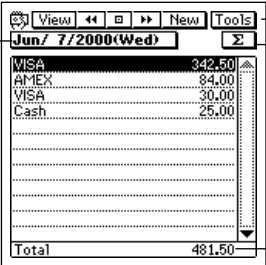


The Expense Manager is like having your own personal bookkeeper along with you wherever you go. You input transaction data as it occurs, and later you can calculate periodic totals. It's the easy way to keep track of your finances day by day.

Entering the Expense Manager Mode

Enter the Expense Manager Mode by tapping **Menu** to display the Mode Menu screen, and then selecting **Expense**. This displays a transaction list for today's date, as kept by the PV Unit's clock.



① Date jump button

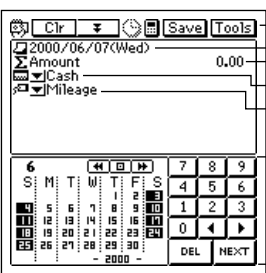
② Data display tool bar

③ Periodic total button

④ Date total

Inputting a New Transaction

1. In any Expense Manager Mode list screen or data screen, tap **New** to display a new transaction input screen.



① Data input tool bar

② Transaction date

③ Transaction amount

④ Payment type

⑤ Expense type

⑥ Date keyboard

- The date that was shown in the date jump button is automatically assigned as the transaction date of a new item. You can leave this date as it is or change it. Tap **NEXT** after you are finished.

2. Input the amount of the transaction, and then tap **NEXT**.
 - An Expense Manager item must have date and amount data. Otherwise, the PV Unit will refuse to store the data when you tap **Save** below.
3. Tap the ▼ arrow to the left of the payment type to open a list of available payment types, and select the one you want to assign to the transaction.

The screenshot shows a handheld device screen with a form for entering transaction data. At the top, there are buttons for 'Clr', a dropdown arrow, 'Save', and 'Tools'. The form contains the following fields:

- Date: 2000/06/07(Wed)
- Amount: 342.50
- Payment Type: A dropdown menu is open, showing 'VISA' and 'Mileage' as options.

 Below the form is a numeric keypad (0-9, DEL) and an alphanumeric keyboard (QWERTYUIOP, ASDFGHJKL, ZXCVBNM, . /). At the bottom of the keyboard are buttons for 'CODE', 'CAPS', 'SPACE', 'SMBL', and 'NEXT'.

- You could also use the text keyboard to input a payment type or to change the payment types inside the list. Payment types can be up to 14 characters long.
4. Tap **NEXT**.
 5. Tap the ▼ arrow to the left of the expense type to open a list of available expense types, and select the one you want to assign to the transaction.

This screenshot is similar to the previous one, showing the same Expense Manager input screen. The fields are:

- Date: 2000/06/07(Wed)
- Amount: 342.50
- Expense Type: A dropdown menu is open, showing 'Hotel' as an option.

 The keyboard and navigation buttons at the bottom are identical to the previous screenshot.

- You could also use the text keyboard to input a expense type or to change the expense types inside the list. Expense types can be up to 14 characters long.

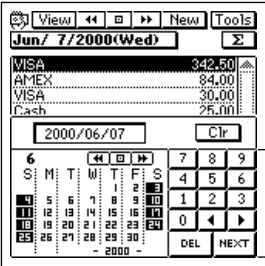
6. After everything on the screen is the way you want, tap ▼ to advance to the description input screen.



7. After inputting the description, tap **Save** to save it.
- If you want to save the transaction without inputting a description, tap **Save** to save it without inputting description text.

Recalling Expense Manager Data

1. In the Expense Manager Mode list screen, tap the date jump button.



— Date keyboard

2. Input the date to which you want to jump, and then tap **NEXT**.
- You can also scroll forward and back through the dates by tapping ◀ and ▶ in the data display toolbar.
 - Rotating the **Action** control scrolls sequentially through the dates.

3. To select the contents of the list screen, tap the **View** button in the data display toolbar to open a menu of data types.

The screenshot shows the 'Payment type' dialog box. The title bar includes 'View', navigation arrows, 'New', and 'Tools'. The dialog lists the following items:

Payment type	Amount
Expense type	550.00
Cash	12.00
Diners Club	25.00
Total	597.00

A vertical scrollbar is visible on the right side of the list.

4. Tap the type of data you want to display in the list.
5. To display the data screen of a transaction, tap the transaction to highlight it and then tap it again.

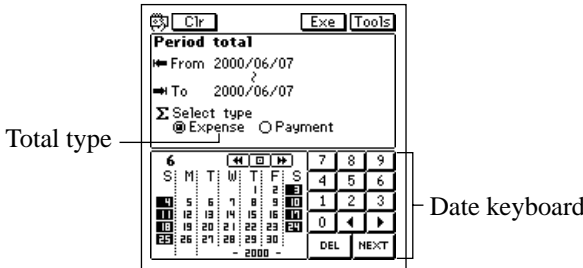
☒ Jun/ 1/2000(Thu)
☒ Amount 12.00
☒ Cash
☒ Meals

At the
SUNSHINE PARK
RESTAURANT

Calculating Periodic Totals

This section describes how to calculate total for a period you specify. You can calculate a periodic total for a specific payment type or expense type.

1. In the Expense Manager Mode list screen, tap the **Σ** button.



2. Input the start date and the end date of the period for which you want to calculate a total.
3. Tap either **Expense** or **Payment** to specify the type of total you want to calculate.
4. When the date and total type are the way you want, tap the **Exe** button.
 - The total of all transactions for which an expense type or payment type is not defined is shown under the title “Other”.

2000/05/25 ~ 2000/06/07 Expense type	
Entertainment	48.00
Hotel	342.50
Meals	37.00
Mileage	280.00
Miscellaneous	84.00
Parking&Tolls	18.00
Phone	25.00
Shopping	30.00
Taxi	25.00
Total	889.50

5. Tap **Esc** to return to the list screen.

Managing Payment and Expense Types

Your PV Unit comes with the built-in payment and expense types shown below. You can use these as they are, or you can change the names of the built-in payment and expense types to suit your own needs.

Built-in Payment and Expense Types

Payment Types	Expense Types
Cash	Mileage
Checking A	Fuel
Checking B	Parking & Tolls
Savings	Taxi
AMEX	Meals
VISA	Phone
Master Card	Entertainment
DISCOVER	Hotel
Diners Club	Miscellaneous
Free	Free

To change a payment type or expense type name

1. Tap the **Menu Bar** icon to display the menu bar, and then tap **Option – Label edit**.
2. Tap either **Payment type** or **Expense type**.
3. Use the **Action** control to select the item whose name you want to edit, and then press the **Action** control.

4. Input up to 14 characters for the name that you want to assign to the payment type or expense type.
5. After the name is the way you want, tap **Save** to save it.